BEND THE CURVE STUDY MISSION
PURPOSE & PROCESS

Purpose:

1. To see that a comparable transformation is possible within one's own agency, that the methods for achieving that transformation are doable, and that I can lead it and be part of it.
2. To increase Lean management/leadership competence and confidence.
3. To develop a Lean mindset -- differentiate implementation strategies that are based in a project mindset versus transformation mindset. Project vs. systemic.
4. To study a range of implementation strategies and practices that have resulted in various performance outcomes and assess their relevance for my leadership, my agency (MDOL, DHHS, DAFS, MDOT, etc.), and myself.
5. To experience the practical application of the theory -- that this will work for us as well. Look at what the theory says and begin to draw conclusions about what's possible for my own agency. Experiential learning.
6. To begin to understand the role and use of measures. (Our measures should be similar to those in other systems.)
7. To prepare myself to teach what I have learned.

Requirements:

- Open: I am open to learning.
- Prepare: I am willing to make the investment to be prepared to work when I get to the site. I have organized my thoughts, questions, and intent.
- Engage: I will extend myself, allowing the "host" to share, disclose, risk, tell their truth – have an authentic conversation. An intentional non-judgmental probing to learn.
- Observe: I will see deeply, intentionally, with all my senses – in an active process.
- Teach: I will then synthesize, document, and apply what I learn.

Process:

I. Organize Study Mission Visit Team – 6 to 15 Participants (P). The size of the team will depend on the preference of the study mission host organization.

A. Identify a Study Mission Team Leader/Coordinator (if not already done).

- For groups composed of more than only CI-Ps, assure that a BTC CI-P is assigned as the "lead" or Coordinator for the study mission.

II. Organize three sessions (the lead CI-P is responsible for this coordination):

A. Initial Meeting – This can be a face-to-face meeting, by conference call, or conducted in the van on the way to the site.

1. Review the Study Mission **Purpose**.
2. Select at least two Recorders -- persons to assure that notes are taken at the site visit and meetings.
3. Develop site visit questions:
   a) Formally develop and document questions from each of the **Purpose** elements. The attached template questions can be used and adapted as needed.
   b) Agree on "question assignments"…who is going to be responsible for focusing on which question(s). Each Team Participant should have written observations for at least his/her assigned questions.
      - There is no specific sequence to the questions. They can be asked as appropriate.
      - The questions may not have to be specifically asked, for they may be covered in other ways by the host. These "assignments" are simply intended to assign responsibility for making certain that the topic is somehow addressed.
      - Informal questions, and there are likely to be many, should also be documented.

B. Study Mission site visit: Assure that all arrangements have been made and the team is prepared.

1. Starting Time**:** The starting time is at the convenience of the host organization/company. The starting time may also depend on how far away the host is from Augusta and the travel time involved. However, study missions have typically started around 9am. There have been a few study missions that started earlier and a few in the afternoon.

   Note: *While this may seem an obvious thing to say, it is very important not to be late, so participants need to be very clear about the time the van or car pool will leave to get to the company on time.*

2. Agenda**:** Study missions follow an agenda, developed with the host company beforehand and with the host in charge, such as –
    - Company Overview & its Lean Journey,
    - the Tour (going to the gemba), and
    - a Question & Answer session following the tour.

    Note: *Typically, study missions have taken about 3 hours or so on site.*

    The CI-P Coordinator (*and as BTC practice dictates, other study mission participants*) should -

    - Be aware that the hosts are in charge of the study mission, but also be prepared, in the Welcome/Start-Up part of the agenda, to give a very brief history of BTC study missions & summarize the purpose of the study mission (why we're there).
    - Thank the hosts at the beginning and at the end of the study mission.
    - Assure that all the question areas are addressed and that the focus stays on the P's being there to learn from the host organization, not to teach the host. This does not, of course, prohibit lively, non-judgmental discussion.
    - Assure that all the study mission P's participate -- that no P is silent or dominates the discussion (this can be challenging in a study mission format).

3. Travel**:** If the study mission is in another town, a State van (7-8 or 15-passenger van depending on the size of the group and what Fleet has available) is usually reserved. Not only is this good carpooling practice, but it also gives participants a chance to discuss and prepare beforehand and, afterwards, to continue discussing the mission. An excellent place to meet up is the parking lot on the other side of the old Labor building, next door to 221 State Street.

C. Debrief Meeting**:** A debrief of the study mission (not including the company) is held immediately after the study mission has concluded, either –
    a. before getting in the transport vehicle, or
    b. while returning in it, or
    c. at the company (if the company's room is still available and arrangements have been made for this), or
    d. at a restaurant during a lunch, or
    e. at a date set for soon after the study mission.

Participants should be ready to discuss their “assigned” questions and any observations they might have.

Discuss and document:

1. Discuss your impressions: What did you see? What did you sense? Feel? What were your impressions? What did you learn? What was most/least impressive? What would be helpful if ‘transported’ to your own agency? What are your specific observations/learning that your agency might benefit from were they to be adopted? Etc. Refer to your questions.
2. Organize Study Mission Team’s observations, including the focus questions and other observations.
3. Prepare to organize how formal sharing(s) with each ELT and BTC colleagues will be done.

III. Follow-up/debrief with the host organization/company. The lead, coordinating CI-P should contact the host and discuss the visit to get their perspective on how it went, what they would suggest, etc.

IV. Share Study Mission learnings with colleagues at your agency, including leadership and BTC members.

A. Study Mission Write-Up/Report**:** the lead “Coordinating” CI-P (or other volunteer) will write up the study mission and submit for inclusion in the *CI-P News* and posting on the BTC website.

B. Clinical: Also could be presented and discussed at Clinical.

C. Other: Presentation to leadership or submission to any departmental / agency newsletters, publications, etc.

SAMPLE STUDY MISSION QUESTIONS

Questions	Answer
1. How does your organization keep the Lean/problem-solving momentum going?	
2. How does it keep constantly changing and improving the process?	
3. What strategies, training, etc., do you use for staff incentives?	
4. What metrics do you have that show that you are making progress? a. What was your baseline?	
5. What is your Lean infrastructure? a. How do you make it happen?	
6. Do you have examples of Lean's application <u>in administrative settings</u>, as well as on the operational end?	
7. How was Lean introduced at your organization?	

8. What are strategies you use to become a Lean organization while continuing daily operations? a. Transitioning?	
9. What are your thoughts about pushing employees to "learn the Lean language?"	
10. Are there any negative impacts, such as negative feedback from employees? a. How is this dealt with?	
11. What are the positives you have experienced ? *(Ex. Improved employee morale, process flexibility, etc.)*	
12. Under what circumstances do you fix a product and move it on, versus halt the work and fix the process?	
13. How did you do the initial education to get people on board with Lean? a. What do you do to keep the learning going?	
14. What Lean tools do you use?	

15. Average time from start to finish of Lean initiatives? (i.e. achieving desired future state)	
16. How are projects identified? a. Screened? b. Approved?	
17. Is Lean used in this specific unit/area only or is it companywide/statewide, etc.?	